

Work Plan

Office Work Plan						
Task Number	Task Name	Functional Area	Who benefits?	Priority	Estimated Effort/Target Date	Notes
	Aleph server configuration	Operations/Support	consortium	1A		
	System files and data backups	Operations/Support	consortium	1A		
	Submit SI's to Ex Libris regarding Aleph problems	Operations/Support	consortium	1A		
	Provide training and workshops for libraries	Operations/Support	consortium	1A		
	Provide answers to Aleph support calls	Operations/Support	consortium	1A		
	Build Aleph answerbook	Operations/Support	consortium	1A		
	Communication with libraries	Customer Relations	consortium	1A		
	Project management	Operations/Support	consortium	1A		
	Keep current on security patches	Operations/Support	consortium	1A		
	Load authority record updates	Operations/Support	consortium	1A		
	Monitor server logs	Operations/Support	consortium	1A		
	Support Gateway for member libraries	Operations/Support	consortium	1A		
	RightNow, FuseTalk support and training	Operations/Support	online learning	1A		
	Administrative activities (budget, personnel management, etc.)	Operations/Support	consortium	1A		
	Proxy server support	Operations/Support		1A		
	Review SI's and notify Ex Libris of urgent issues	Operations/Support	consortium	1A		
	Consultations with Libraries as needed	Customer Relations	library	1A		
	Review and reset priorities for outstanding Aleph problems	Operations/Support	consortium	1A		
	Global changes as requested	Operations/Support	library having change done	1A-E		Depends on urgency of change
48	Version 17: Training preparation for new version 17 client	Training	consortium	1B		To be determined
88	Version 17: Distribute new 17 GUI client	SYSTEMS	consortium	1B		Date to be determined
124	Version 17: Test functionality of OWN control	CAT, SYSTEMS	consortium	1B	Low	Changes in version 17
131	Version 17: Profile maintenance at ADM rather than SYS in version 17	Development	consortium	1B		Request sent to Ex Libris; action determined after we get an answer
145	Version 17: OPAC Course Reserves modifications	OPAC, COURSE RESERVES, SYSTEMS	libraries using CR	1B		Ex Libris development for Version 19
149	Update PALS home page	SYSTEMS	consortium	1B		Using Drupal
193	Version 17: Prepare documentation (perhaps Web based training) for GUI client, plus revise Aleph Vocabulary	Training	consortium	1B		To be determined
242	Version 17: Re-train all libraries on version 17	Training	consortium	1B		
325	Version 17: URL report via p-print-08	Cataloging	consortium	1B	Low	AI indicated it would be easy for him to re-construct the URL checker in Aleph and then have it print via p-print-08 in 15.5; built into 17; defer to 17.
336	Version 17: Plan implementation	Planning	consortium	1B		
339	Version 17: Convert data via Upgrade Express	Upgrade	consortium	1B		
340	Version 17: Update tables via Upgrade Express	Upgrade	consortium	1B		
341	Version 17: HTML customization	Upgrade	consortium	1B		
342	Version 17: Complete project plan	Upgrade	consortium	1B		
358	Version 17: Add OWN code to holdings records	Upgrade	consortium	1B		
363	Version 17: Implement Payment Method for Cash Transactions	Upgrade	consortium	1B		
364	Version 17: Implement new Patron Tab in Loan and Return Window	Upgrade	consortium	1B		
365	Version 17: Implement new fields in Patron Record	Upgrade	consortium	1B		
366	Version 17: Implement Circulation Log	Upgrade	consortium	1B		
367	Version 17: Implement Sounds for Circulation functions	Upgrade	consortium	1B		

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386	Version 16: Implement new client Task Manager	Upgrade	consortium	1B		
389	Version 16: Implement GuiSys.ini	Upgrade	consortium	1B		
239	Test Aleph Reporting Center	ACQ/SER,CAT,CIRC, ILL,OPAC,SYSTEMS	part of the consortium	1C		some testing has been done; how to support?; figure out licensing; schedule ARC discussion; decided to form a group to look at reporting needs, evaluate ARC
334	Investigate Aleph reports alternatives	Reports	consortium	1C		To be determined
354	Edit inventory procedure document	Inventory	consortium	1C		
300	Version 17: Explore sort options in WebOPAC	WebOPAC	consortium	1D	High	WebOPAC issues #27; will implement in version 17
276	Add note to logon screen explaining what the password is	OPAC	consortium	1E		SBJ sent recommendation; will be made available for libraries' evaluation; January MATF meeting UPDATED?
299	Change revise and filter links to modify and limit	WebOPAC	consortium	1E	Medium/April UG	WebOPAC issues #26; Plan to have done by 2006 Spring Users Group
301	Advance search page year limit: provide an example showing range of dates	WebOPAC	consortium	1E	Medium/April UG	WebOPAC issues #30, range searching is now working on version 15.5
303	Version 17: Add option to sort results by date, author, title	WebOPAC	consortium	1E	Medium	WebOPAC issues #69
305	Recommend placing call number prefix after the words call number	WebOPAC	consortium	1E	High	WebOPAC issues #76, we can leave as is, put after collection but if no call number it will still display; if no \$k call number label will not display; going back to MAFT for explanation
307	Version 17: On brief display list use alternating background color or shading	WebOPAC	?	1E	High	WebOPAC issues #22
329	Search Limits Added to Basic Search Page (v.17): For version 17, the Task Force recommends that limits on the Basic Search page be retained as delivered out-of-the-box, and that the Filter button (which is to be renamed Limits in v. 15) be eliminated when v. 17 is implemented.	WebOPAC	consortium	1E		Web OPAC Issue #91; version 17 issue; The Task Force further recommends that the limits on the Advanced Search page of our v. 15 NOT be moved forward, as it would be too labor-intensive to implement in v. 15.
7	Test ISO ILL between ALEPH and VDX	ILL	consortium	2A	High	in progress
250	Investigate value-added services such as SFX, Metalib, etc.	Administrative,SYSTEMS	consortium	2A		
295	Proxy server enhancement--off-campus access to netLibrary records	Proxy Server	proxy libraries	2A		Clientele ticket #27423; requires purchasing new server; Rod sent email to users no one has set it up yet; in testing with SSU and RVL; WHAT IS CURRENT STATUS? WHAT IS TARGET DATE?

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						ExL needs to pursue first; 12/14 ExL reported that testing has begun; ExL reported on March 22, 2006 that testing was completed successfully; next step is for PALS to test with OCLC
313	Test ISO ILL between Aleph and OCLC	ILL	consortium	2A		
333	Implement collaboration software	Online Learning	task forces; classes	2A		WHAT IS CURRENT STATUS?
344	Version 18: Discuss version 18 Upgrade			2A		
345	Implement interface with Blackwell Collection Manager	ACQ	a few libraries	2A		will work on as time allows
355	Add STAtus field so 'suppressed' can be used in course reserves (like Web OPAC)	Course Reserves	many libraries	2A		
359	Version 17: Implement new SDI feature	Upgrade	consortium	2A		
360	Version 17: Implement new My e-Shelf feature	Upgrade	consortium	2A		
361	Version 17: Implement Filtering Available Items	Upgrade	consortium	2A		
362	Version 17: Implement Inventory Management	Upgrade	consortium	2A		
368	Version 17: Investigate LDAP authentication for GUI staff users	Upgrade	?	2A		
369	Version 17: Test batch service for Inventory (Shelf Report Number) Definition (item-01)	Upgrade	consortium	2A		
370	Version 17: Test batch service for Inventory Marking (item-08)	Upgrade	consortium	2A		
371	Version 17: Test batch service for Inventory Summary (item-09)	Upgrade	consortium	2A		
372	Version 17: Test batch service for Inventory Report (item-10)	Upgrade	consortium	2A		
373	Version 17: Test batch service for Delete Item Records (item-11)	Upgrade	consortium	2A		
374	Version 17: Test batch service for Bind Alert Report (bind-01)	Upgrade	consortium	2A		
375	Version 17: Test batch service for Serial Binding Slip (bind-02)	Upgrade	consortium	2A		
376	Version 17: Test batch service for Replace Vendor - Close and Open Orders and Subscriptions (acq-27)	Upgrade	consortium	2A		
377	Version 17: Test batch service for Change Order Status and EDA in Order Records (acq-28)	Upgrade	consortium	2A		
378	Version 17: Test batch service for X-Server services	Upgrade	consortium	2A		
382	Version 17: Test Retrieve Record Keys (manage-70)	Upgrade	consortium	2A		
383	Version 17: Test all options in Update Patron Records (cir-77)	Upgrade	consortium	2A		
385	Version 17: Test new batch service Retrieve Record Keys (manage-70)	Upgrade	consortium	2A		
387	Version 16: Implement Identification of a Workstation	Upgrade	consortium	2A		
388	Version 16: Implement XSL Editor	Upgrade	consortium	2A		
390	Version 16: Implement Save/Mail Format for Endnote	Upgrade	consortium	2A		
391	Version 16: Implement Fast Patron Registration	Upgrade	consortium	2A		
127	Version 17: Test summary holdings display in OPAC	CAT, OPAC, SER, SYSTEMS	consortium	2B	Medium	
343	Version 17: Implement Booking	Upgrade	consortium	2B		
379	Version 17: Investigate PDS Integration	Upgrade	consortium	2B		

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331	Course reserve indexes added to the dropdown for all search pages	WebOPAC, Course Reserves	libraries using CR	2C		In the WebOPAC, none of the course reserve indexes are listed in the dropdown for Advanced Browse (advanced browse is needed for indirect indexes since all indirect indexes are set up as browse searches). Since Course Reserves is at the ADM level, the work will mean our tech staff will have to type the dropdowns for every library that uses Course Reserves ... it is not a one-time setup, but must be done individually for each library. Incident #29789
122	Post-version 17: Prepare booking training for libraries	Development	libraries using Booking	2D	High	
123	Post-version 17: Conduct booking training for libraries	Development	libraries using Booking	2D	High	
283	Post-version 17: SDI Webinar or Tutorial	OPAC, Planning, Training		2D	Medium	Improved SDI available with version 17
79	Test EDI with B&T for book and entertainment orders	ACQ, SYSTEMS	how many acq users?	3A	Medium	sent batch to B&T; working with Cedric; ordering part is complete, the order acknowledgement piece is in progress.
110	Test cash transaction financial interface with MnSCU business office	SYSTEMS, CIRC	MnSCU libraries; others if local business office can handle format	3A	Medium	In progress
132	Investigate exporting bib records from MnPALS to OCLC	CAT, SYSTEMS	consortium	3A		Talked to CCLA & FCLA; can't do in 15
207	Write API for cash transactions transfer merge 110 below	SYSTEMS	MnSCU libraries; others if local business office can handle format	3A		started; on hold
234	Test EDI with EBSCO for serials claims	ACQ/SER, SYSTEMS	libraries using serials	3A		in progress
246	Negotiate maintenance agreement with Ex Libris	Administrative	consortium	3A		In negotiations; waiting for Ex Libris response
262	Investigate and Test then Load holdings back to OCLC	CAT, Planning, SYSTEMS	consortium	3A	Medium	IN version 17
310	Change links in header (basic, advanced command)	WebOPAC	consortium	3A	Medium	WebOPAC issues #88; partially implemented on lute, still some work to do, to change needs to change 2 header files per library

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380	Version 17: Investigate Bibliographic Loaders for Multi-ADM Environment	Upgrade	?	3A		
381	Version 17: Investigate impact of loading patron photos	Upgrade	consortium	3A		
384	Version 17: Investigate Aleph Digital Asset Module (ADAM)	Upgrade	consortium	3A		
392	Version 16: Investigate Parallel Indexing	Upgrade	consortium	3A		
356	Update course reserve setup	Upgrade	consortium	3C		
81	Test EDI with Book House for book orders	ACQ, SYSTEMS	a few	4A	Medium	
194	Set up and test emailing order lists to vendors	ACQ/SER	how many acq users?	4A		
233	Post-version 17: Create class and Conduct HTML customization training	OPAC,SYSTEMS	libraries willing to take on task	4A	High	Does the cost of doing the training outweigh the benefits? Should there be different interfaces beyond branding?
280	Change in practice for nonfiling characters (diacritics)	Cataloging	?	4A		Mary Ann will report back to DBQM;
312	Version 17: Aleph Digital Assets Module thumbnails?	Cataloging	consortium? Especially those who don't use a digital management system already	4A		version 17; work with MSU,Mankato Daardi Sizemore
346	Track OPAC issues as liaison to MATF	OPAC	MATF	4A		
351	Work with Data Base Quality Management Task Forces about A) HOL fields to index; B) Use of textual fields in HOLD records; C) Discuss OCLC and Aleph issues, such as which records need to be entered in OCLC and which can reside only in Aleph; and D) Report back on nonfiling characters E) Other issues as they arise	Cataloging	DBQM; possible consortium if group has authority to enforce its recommendations	4A		meet in summer 2006
352	Site visits to libraries	Customer Relations	consortium	4A		Post version 17 or 18